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Last night two small drones struck the Kremlin. Russian media is claiming it was an attempt on Putin's life, and vowing retaliation. There's hyperventilation in some parts of the social media ecosystems that this means WW3. Neither is true. Let's talk about what it means. 1/n <https://t.co/E018WvoL3k>

First, UA has apparently been trying to do this for a bit. The US reportedly waved off UA plans to "celebrate" the anniversary of the invasion with strikes. Another crashed drone was found just outside of Moscow last week. 2/n <https://apnews.com/article/russia-ukraine-war-drone-crimea-moscow-a1931eabbc874939b0e08ec9a8b77038#:~:text=Ru>

These strikes are pinpricks: the warhead on the drones doesn't appear very large in the video on the first tweet. The wings on them are straight and thin, meaning this is likely a small, slow, cheap, long endurance, (relatively) unsophisticated vehicle. 3/n

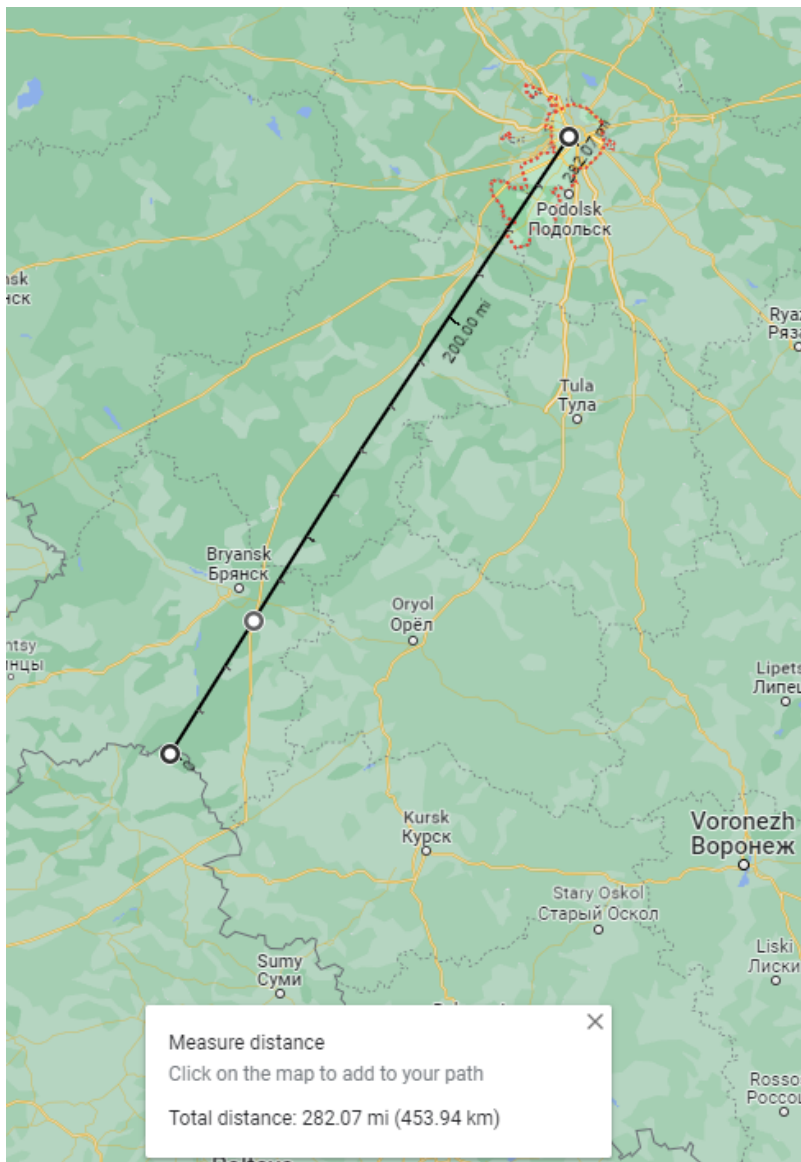
This also implies that the attack can be replicated: it was not a one-off. In some ways it resembles the Doolittle raid: low impact in terms of the actual damage done, but potentially significant based on Kremlin reaction. It also signals a significant capacity. 4/n

This is an embarrassment, far worse than some guy landing a Cessna 172 in Red Square. Putin's ego and carefully cultivated tough guy aura demand retaliation, and also that this not happen again. 5/n <https://www.aerotime.aero/articles/31136-plane-landing-in-red-square#:~:text=On%20this%20day%2035%20years,throw>

It would be extremely embarrassing for this to happen a second time, and make Putin look impotent to stop Ukrainian attacks. Therefore, he's almost certainly going to pull scarce Short Range Air defenses (like the Pantsir) back to Moscow. 6/n

If Russia is intensely defending targets with only symbolic value, they're not protecting things with real military or strategic value. Same way Japan freaked out after the Doolittle raid and pulled back valuable interceptor aircraft and pilots to guard the home islands. 7/n

This also shows that UA can (probably) reach out to at least 450km with their drones, unless the launch took place from somewhere inside Russia (which would induce an even bigger Russian freak out and paranoia). Either possibility is bad for RU. 8/n <https://t.co/ae2bkEI5gL>



There's also the terrible tyranny of mathematics. The amount of land area RU has to protect increases exponentially for every extra km UA drones can fly. ( $\text{Area} = \pi \cdot r^2$ ). There is a finite number of SHORAD systems RU can deploy, and a finite number of men to crew them. 9/n

RU cannot defend everything within range of these drones at once.

Despite the small explosive payloads of these drones, there are targets that they can cause significant damage to: namely fuel tanks and fragile aircraft. 10/n

UA appears to be concentrating on hitting RU fuel tanks over the past few days, near Sevastopol in Crimea and Taman near the Kerch Strait. Their damage to both appears significant. 11/n

<https://twitter.com/Osinttechnical/status/1653581066031038466>

We're also seeing what may be UA SOF teams working inside RU and Belarus to derail trains carrying petroleum products. This all suggests pre-offensive shaping operations to me. 12/n

<https://www.bbc.com/news/world-europe-65458847>

This is speculation on my part: but perhaps the thinking is that enough disruption of fuel supplies may make it harder for RU to move troops and vehicles around in response to wherever the UA offensive takes place, and limiting counter-attacks due to temporary fuel scarcity. 13/n

Or, there could be some 3D Chess happening here, misdirection, or UA (like a good magician) otherwise using these drone strikes to make the audience look over here while their other hand is doing something else they don't want people to see. 14/n

But, my big take-away here is that RU will react by pulling high-end short range air defenses back towards Moscow, like the SA-22/Pantsir. This also means something else will have less defenses in a zero-sum game of coverage. 15/n

Addendum: RU is going to demand retaliation with their own airstrikes. They have a very limited (and shrinking) supply of precision long range weapons, and attempting to blow up governmental buildings in Kyiv isn't the best use of them. 16/n  
**<https://www.cnn.com/2023/03/10/europe/ukraine-russia-missiles-air-defenses-explainer-intl/index.html>**

It benefits UA for RU to spend scarce resources on targets with no real military value, instead of on things that would really hurt (i.e. munitions depots, vehicle repair yards, barracks, C2 nodes, etc...). 17/n

If RU sends waves of expensive, hard-to-manufacture hypersonic weapons at government buildings in Kyiv or Zelensky's personal residence, that's a good trade for UA. It's sort of like smashing a fly with a Fabergé egg. Yeah, you got it, but what did it cost? 18/n

P.P.S. Interesting to note that there were two men climbing to the top of the dome as the UAV exploded. At 3 AM. That's...weird. The UAV's wingspan in comparison looks much less than the 16 ft of a Mugin-5. False flag looks a little more plausible. 19/n

Ok, a lot more plausible.